



SENIOR & LONG TERM CARE DIVISION COMMUNITY SERVICES BUREAU

HOME AND COMMUNITY BASED WAIVER Policy Manual

Section: ELIGIBILITY FOR SERVICES

Subject: Wait List Criteria Tool Scoring

References: ARM: 37.40.1408

PURPOSE

This tool was developed to assist Case Management Teams (CMT) in prioritizing each applicant's needs. The instrument is designed to complement professional judgment in determining which applicant is in most need of services. Questions are geared toward assessing specific waiver needs and to facilitate discussion.

PROCEDURE

The CMT has discretion on how to administer the tool. Some CMTs may choose to use one form per applicant. Other CMTs may choose to have each team member complete a separate form, combine the scores and average the total score. The minimum score is 13 and the maximum is 37.

INSTRUCTIONS

Complete the tool scoring each question with the point system below that best addresses the applicant's current status.

1. Is the applicant at risk of medical deterioration without services?

Score 1 – is maintaining medically at home

Score 2 – some needs are being met but additional services could help maintain or improve the applicant's medical status

Score 3 – terminal or rapidly deteriorating condition, unmet skilled care needs, recent hospitalization or institutionalization.

2. Does the applicant have cognitive impairment?

Score 1 – is alert and oriented and capable of making good decisions

Score 2 – is alert and oriented but uses poor judgment or has minor cognitive impairment (e.g., some short-term memory loss)

Score 3 - consistently uses poor judgment or inability to function independently without supervision and/or constant reminders

3. Is applicant in a nursing facility or at risk of institutional placement or death?

Score 1 – not at risk or is at minimal risk of placement (could be institutionalized within the next six months)

Score 2 – at moderate risk (could be institutionalized within the next three months)

Score 3 – is at imminent risk of placement or death, the family situation will deteriorate without waiver services, will have to move from assisted living to nursing facility, or is in an institution

4. Does the applicant require 24-hour supervision?

Score 1 – does not require 24-hour supervision or the current level of supervision is adequate or age appropriate

Score 2 – requires additional supervision, cannot be left alone for more than 6-8 hours but has formal and informal supports available to provide care

Score 3 – cannot be left alone and requires 24-hour supervision and caregivers require ongoing support

5. Is there a need for more formal (paid) services?

Score 1 – current services provided are adequate

Score 2 – is receiving services but needs additional support

Score 3 – services are inadequate or funds are running low

6. Is there a need for more informal supports?

Score 1 – family or friends are able to provide adequate support

Score 2 – moderate support or could benefit from additional support to maintain or improve the situation

Score 3 – informal support is absent or inadequate

7. Does the primary caregiver need relief?

Score 1 – no caregiver available or caregiver is unavailable

Score 2 – caregiver needs intermittent or occasional relief

Score 3 – caregiver requires immediate or on-going relief and/or caregiver's health is in jeopardy

8. Is there a need for adaptive aids or environmental modifications?

Score 1 – both CMT and applicant agree that adaptive aids or environmental modifications are not necessary

Score 2 – difference of opinion between the CMT and applicant

Score 3 – both determine that there are needs (assess for urgency of need)

9. Does the applicant frequently utilize emergency services?

Score 1 – no Emergency Room (ER) visits and/or Emergency Medical Services (EMS) call in the last three months

Score 2 – only one ER visit and/or EMS call in the last three months

Score 3 – multiple ER visits and/or EMS calls in the last three months

10. Has the applicant had involvement from Adult Protective Services (APS), Child Protection Services (CPS), Law Enforcement or Ombudsman?

Score 1 – no known involvement

Score 2 – past involvement but it has been resolved

Score 3 – recent involvement (i.e., in the last three months) whether or not it has been resolved

11. Does the applicant have safe, adequate housing?

Score 1 – has safe adequate housing

Score 2 – has concerns with safety and affordability and could use assistance in exploring other options

Score 3 – has a barrier to obtaining adequate housing (e.g.,

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sexual/violent offender or felony record)

12. Does the applicant receive financial support through family or other resources?

Score 1 – financial support is received currently and could continue for at least six months

Score 2 – financial support is received but is causing hardship or will run out of funding within the next three months

Score 3 – no informal supports that can assist financially and does not have any resources to maintain their existing services

13. Are there other health and safety issues (not identified in 1-12) that place the applicant at risk? Please explain below in comments.

Score 1 – there are additional health and safety issues and document specific circumstances in the “comments” section.

14. Does the applicant require spousal impoverishment or waiver or deeming for children, to qualify for services?

Circle Y or N

Total Score: Enter the total score obtained on the review date.

Comments: Include any information that is important for making a determination but is not necessarily addressed in the questions. This section can also be used to document status changes between review dates.

CM Signature/Date: Signed and dated by the case manager completing this tool.